TRAVEL PRINTOUT
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Weekend Travel Soars In Summer Of Decline

As Americans plan for vacations this summer, industry experts hope that this summer will be much brighter than the summer of 1991. Although last summer's numbers showed an overall decrease in the amount of travel in the United States, there were also positive signs.

For the first time since 1986, the amount of summer travelers declined. Nearly 215 million trips were taken during last summer (June - August), down 3.5 percent from the previous year. On a person-trip basis, travel decreased nearly 3 percent, from 437.0 million person-trips during the summer of 1990 to 425.4 person-trips in 1991.

" The economy was the major factor influencing this decline," said Suzanne Cook, the Data Center's executive director.

Key economic factors during the summer of 1991 contributed to the decline in the person-trips. The Gross Domestic Product dipped 0.8 percent and payroll employment posted a 1.4 percent decline. The amount of real disposable income also declined, although slightly by 0.2 percent.

Economics also played a major role in the way in which travelers vacationed last summer. Weekend trips were the only segment of summer travel to increase. This segment of travel grew substantially, as nearly 245 million person-trips were recorded.

Transportation costs were another factor last summer. There was an increase in travelers using ground transportation rather than flying. In the summerof 1991, air person-trips fell almost five percent.

The most popular destination region during the summer of 1991 was the Southeast, receiving 109.5 million person-trips. Despite this number, the region experienced a decline by nearly five percent over the previous summer.

Weekend excursions were the only segment of summer travel to increase in the summer of 1991. The area of travel grew 14 percent. -- *USTDC 1991 Summer Travel Market Report*

In addition to overall person-trips, another trip category also suffered a decline. Business and convention travel declined nearly eight percent during the summer of 1991.

Last summer over 80 percent of travelers indicated they traveled for pleasure. Of the total 425.4 million person-trips, 33 percent were taken to visit family of friends, 31 percent went for entertainment and 17 percent traveled for outdoor recreational activities. Only 12 percent of all person-trips were taken for business reasons.

Last summer, travelers stayed closer to home, averaging person-trips of 820 miles (round trip). That number is down from the previous summer. Business and conventions trips were especially effect in this category, as round trip mileage dropped over 14 percent.From 990 in 1990 to 850 in 1991.

Demographically, many of the summer 1991 travelers were married (57%), male (54%), between the ages of 25-44 (46%) and had completed college (42%). The average traveler worked in a typical professional or managerial position (27%) and earned an annual family income of $40,000 or more (50%). The average age of the traveler in the summer of 1991 was 42 years old.

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Cost Of Travel Increases For Fourth Consecutive Month

For the fourth consecutive month, the cost of travel increased in the United States. According to the Data Center's latest Travel Price Index (TPI), the 0.7 percent rise in March travel costs were mainly attributed to an increase in the cost of airfares.

Travel costs in the United States have only decreased twice in the last ten months. In November, travel expenses declined 1.6 percent, but increased in January by 2 percent. The TPI also decreased in September by 2.2 percent, the largest drop in 1991. Overall, the TPI rose 2 percent over the same period last year.

The TPI, which measures seasonally unadjusted changes in the cost of travel in the United States, increased to 149.2 (1982-84 = 100) during March. The TPI indicates price changes in travel goods and services available to consumers in the U.S. and does not necessarily represent changes in the average fares, rates and other costs that travelers actually paid.

TRAVEL PRICE INDEX AND COMPONENTS

MARCH 1992	MONTHLY % CHANGE FEBRUARY 1992 TO MARCH 1992	ANNUAL % CHANGE MARCH 1992 TO MARCH 1991
TPI COMPONENTS		
TRANSPORTATION	1.7	-1.9
Airline fares	2.7	-2.7
Intracity Public Trans.	0.3	6.6
Other Intracity Trans.	0.4	4.3
Motor Fuel	0.5	-1.3
LODGING	0.9	3.3
FOOD AND BEVERAGES AWAY FROM HOME	0.2	2.7
ENTERTAINMENT	0.4	5.4
TRAVEL PRICE INDEX	0.7	2.0
CONS. PRICE INDEX	0.5	3.2

(SOURCE: U.S. TRAVEL DATA CENTER)

The U.S. Travel Data Center releases the Travel Price Index in the last week of each month. For more information on the TPI, contact Joseph P. Horak at (202) 293-1040.

Joseph P. Horak Named Public Relations Coordinator

Suzanne Cook, executive director, appointed Joseph Horak to fill the public relations coordinator position with the U.S. Travel Data Center.

Horak spent the last two years working in public relations with the Kansas City Comets and the Kansas City Royals. The University of Kansas graduate also coordinated public relations for the 1991 Major Soccer League All-Star Game.

"We are extremely pleased to have Mr. Horak join the Data Center," said Cook. "I believe his background and experience will be a benefit to our group and assist in our continuing efforts to keep the travel industry supplied with important market and economic information."

In addition to other duties, Horak will edit the *Travel Printout* newsletter. He is also responsible for co-organizing the Data Center's 11th Annual Summer Vacation Forecast news conference, which is held in conjunction with the American Automobile Association. The event, to be held in Washington, D.C. on May 19th, will unveil the Data Center's/AAA summer travel projections for Memorial Day and the remainder of the summer.

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Joseph P. Horak, Editor

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European Travel Fairs Better Than Expected In Unstable Travel Season

Nineteen ninety-one looked as if it would be a difficult year for the European travel and tourism industry. However, despite gloomy projections, the European Travel Intelligence Center (ETIC) announced that preliminary results of their European Travel Monitor (ETM) indicate that the downturn in travel was not as sharp as industry analysts had predicted.

There were three major factors that contributed to the decline in 1991 European travel: the negative impact of the Gulf War, the major economic recession and the political crisis in Yugoslavia, one of the area's top markets for tourism.

"Nevertheless," said Rolf Freitag, executive director of ETIC, "European outbound travel has clearly survived the political and economic crises. This reflects the importance of the industry and its enormous potential for the future.

"In addition," said Freitag, "it is also indicative of the increased professionalism of the European travel industry. When there is a crisis in one sector or destination, the trade is far quicker than it used to be in offering alternatives."

The overall trend does mask wide differences from one market to another. The ETIC results found that certain European markets profited from the misfortunes of other sectors.

Central Western Europe, comprising Germany, Austria and Switzerland, was the only region to register an increase in trip volume as an origin. This increase was primarily due to the influx of former East Germans, who were able to travel abroad.

In terms of destinations, the Mediterranean bordering countries lost further market share, due mainly to the unrest in Yugoslavia. On the other end of the spectrum, Scandinavia and Eastern Europe recorded a 19 percent increase in the volume of incoming travel.

Information contained in this article can be found in the *European Travel Monitor Update*. For more information on European travel and the European Travel Intellegence Center, contact Susan Weil at the U.S. Travel Data Center at (202) 293-1040.

Custom Research Catalog Now Available

The U.S. Travel Data Center has released a catalog describing several of the many research capabilities the Data Center offers the travel industry.

The free catalog, available to the public, gives detailed descriptions of Data Cener services which help travel businesses evaluate their product and market.

In addition to adding questions to or utilizing information collected through the National Travel Survey and measuring the impact of travel and tourism on the economy through the Data Center's Travel Economics Impact Model (TEIM), services include image studies, visitor profiles, advertising tracking studies, international data, focus groups, telephone surveys and the development of specialized research plans.

To order a copy of the catalog, call the U.S. Travel Data Center's marketing department at (202) 293-1040. (Data Center members will be mailed a copy of the catalog.)

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Later this month, the Data Center will release its outlook for the 1992 summer vacation season. In cooperation with the American Automobile Association, the Data Center will forecast the volume and reason for travel this summer. In addition, the outlook will also delve into the economic ramification of travel this summer.The AAA will discuss the travel forecast for the Memorial weekend holiday.

For more information on the Summer Vacation Forecast as well as other publications, contact the Data Center at (202) 293-1040.

CURRENT TRAVEL INDICATORS 1991 - 1992

	MONTH	VALUE	UNITS	PERCENT CHANGE MARCH / YR. AGO	/ YR. AGO	/ YR. TO DATE
Establishment Receipts or Retail Sales						
Hotels, Motels, Other Lodging (1)	FEB	$5,766	millions	17.3	7.6	7.2
	JAN	$4,915	millions	29.3	6.7	6.7
Eating and Drinking Places (2)	MAR	$16,519	millions	- .5	6.2	6.3
Gasoline Service Stations (2)	MAR	$10,208	millions	- .8	-5.6	-6.8
Consumer Lodging Demand						
Hotels/Motels Occupancy Rates (3)	FEB	61.7	percent	2.0	3.0	2.5
	JAN	60.5	percent	- .7	2.0	2.0
Real Demand For Commercial Lodging (4)	FEB	63.4	millions	21.3	6.3	6.2
	JAN	52.3	millions	7.0	6.0	6.0
Airline Passenger Traffic (5)						
Domestic Revenue Passenger Miles	MAR	27.5	billions	17.4	2.2	.3
Int'l Revenue Passenger Miles	MAR	10.1	billions	17.5	44.9	38.4
Highway Traffic Volume (6)						
Rural Arterial Vehicle Miles	FEB	38,186	millions	-2.8	5.8	6.3
Rail Passenger Traffic (7)						
Amtrak Passenger Miles	FEB	437.9	millions	-6.4	-1.6	-1.0
Travel Price Index (8)						
(1982-1984 = 100)	MAR	149.2		.7	2.0	1.6
Visitor Vol. at National Park Service Areas (11)						
Recreational Visits	N/A					
Overnight Stays	N/A					
Foreign Arrivals to the United States						
From Overseas (12)	DEC	1,448,595		18.8	9.0	7.3
From Canada (13)	FEB	1,095,681		-9.4	10.4	12.3
From Mexico (12)	DEC	158,216		58.0	9.9	7.6
U.S. Citizen Departures						
To Overseas (12)	DEC (90)	1,262,000		18.0	3.6	8.0
To Canada (13)	FEB	497,854		14.9	6.1	9.5
Domestic Demand For Motor Gasoline (14)						
Barrels Per Day	FEB	6,851	thousands	- .6	.7	2.2

SOURCES: (1) Smith Travel Research, seasonally adjusted. (2) Bureau of Census, preliminary, revised monthly. (3) Smith Travel Research, seasonally adjusted, 1986 and 1987 data has been revised. (4) Smith Travel Research, unadjusted room nights sold. (5) Air Transportation Association, preliminary, U.S. scheduled service air carriers. (6) Federal Highway Administration, preliminary revised monthly. (7) National Railroad Passenger Corporation (Amtrak). (8) U.S. Travel Data Center and Bureau of Labor Statistics. (9) U.S. Travel Data Center. (10) U.S. Travel Data Center, data is not comparable to earlier published numbers due to revised methodology. (11) National Parks Service, preliminary, unadjusted for differences in reporting units. (12) U.S. Travel and Tourism Administration, Mexican data reflect I-94 arrivals only. (13) Statistics Canada. (14) U.S. Department of Energy, prelim.

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